Welcome to our new Document Management Software Filetrack

Contents

FIRST SCOTTISH DOCUMENT MANAGEMENT WEB PORTAL

Please log onto https://www.firstscottish.com/

Choose Document Management below in green:

This will take you to the following screen:

Click enter portal
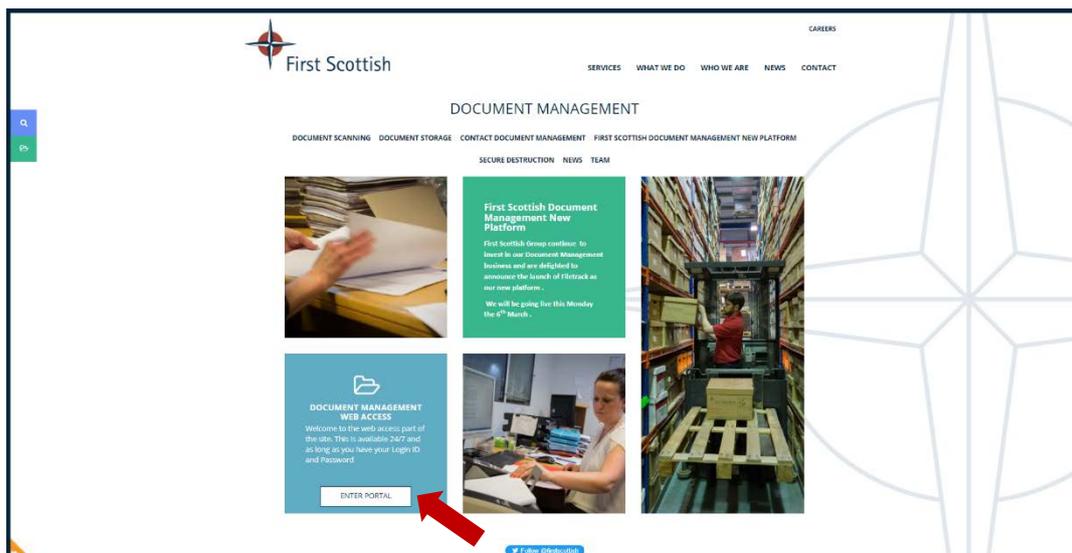
LOG INTO DOCUMENT MANAGEMENT PORTAL
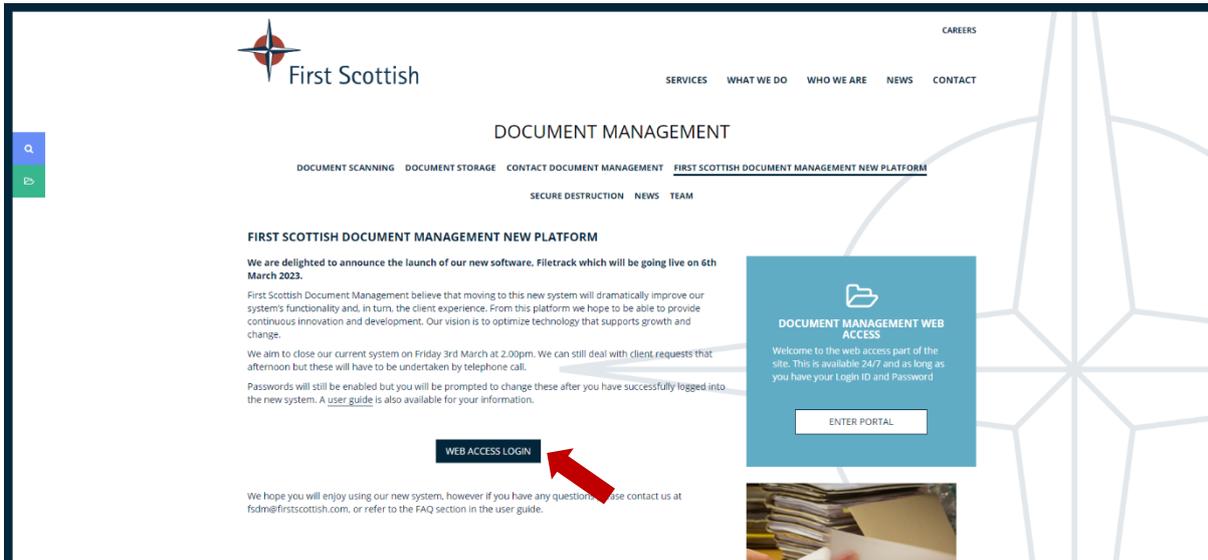
WELCOME TO FILETRACK.

You will be able to use your original username and password to <u>Change/Add your password</u>.

This will need to be at least 10 characters long.
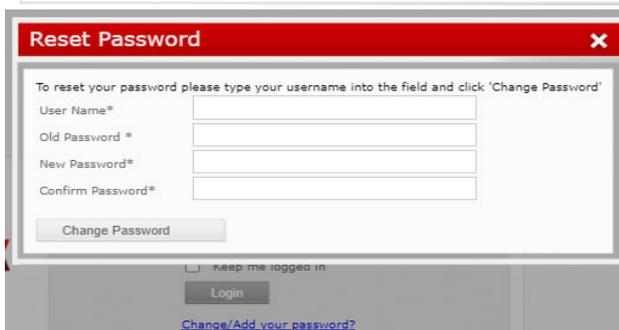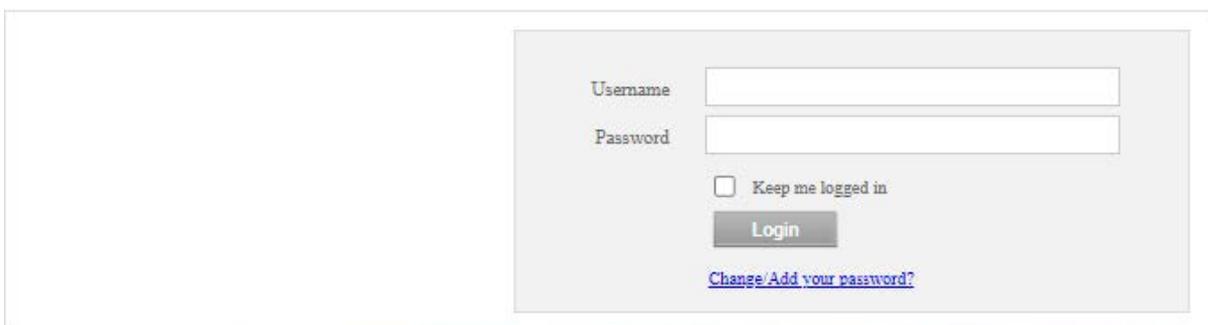
After filling in these 4 fields and click the change password button you can now log in (above picture) using your username and new password.

SEARCHING FOR A FILE

From here you can order files to be returned to you or view scanned files with ease.

If you need to search through all your files which will include Destroyed and Retrieved files click on the blue search button.

If you only want to search for available files click on retrieve from storage.

When you choose the colour will change to Green as below:

From the drop down menu please choose File:

You can then enter the name of the person you are looking
for in the customer information section. Then choose show all items. If you cannot see
anything you may need to choose the search button at the top. Please note: you cannot
retrieve files highlighted in Pink as they're destroyed or in Blue as they're already retrieved.

ORDER FILES FOR DELIVERY

Once you find the file you require then click on the cart to add to cart:
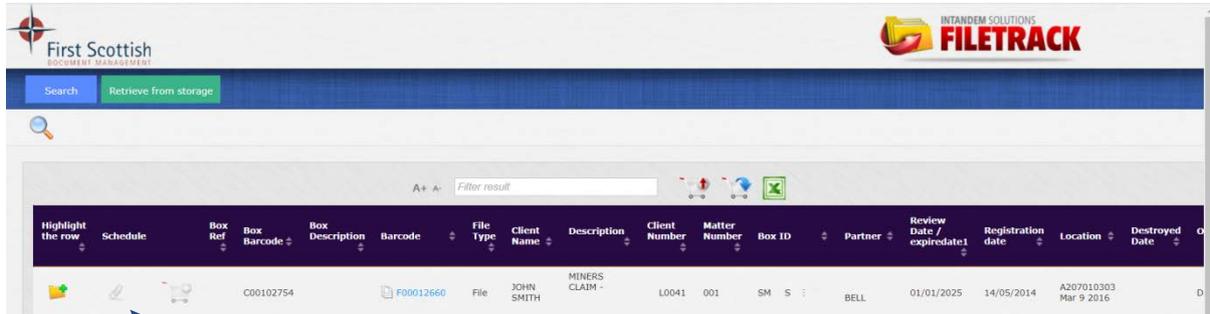
You will then see the amount of files you have added,
click on the cart to continue:
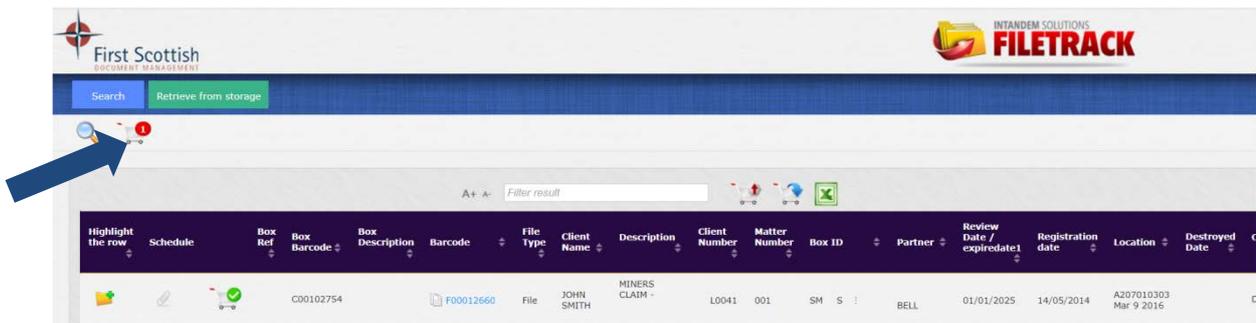
Choose address, priority and add any notes/instructions then click send request:
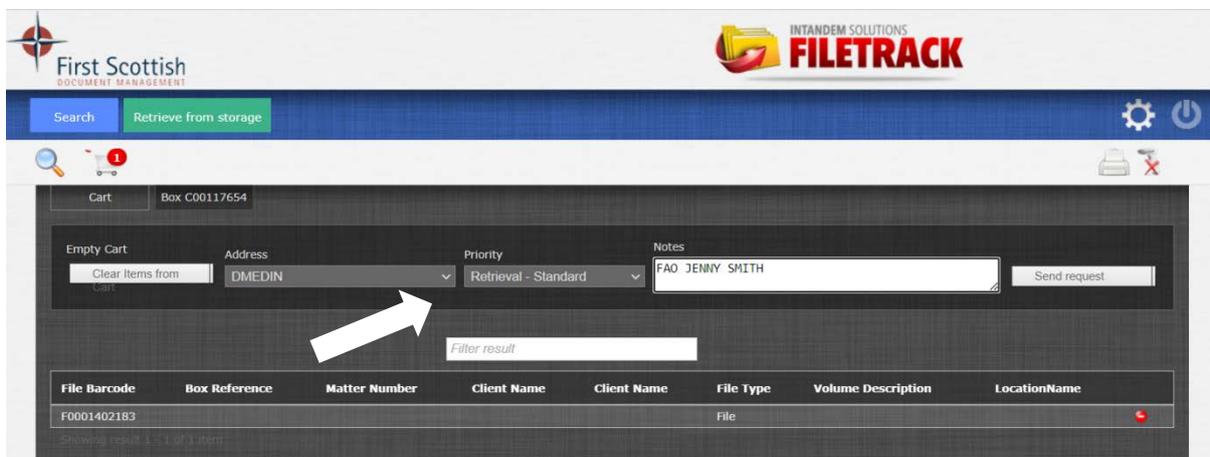
Please note your reference number below, this message tells you your request is now with us.

Your file will arrive the next morning.
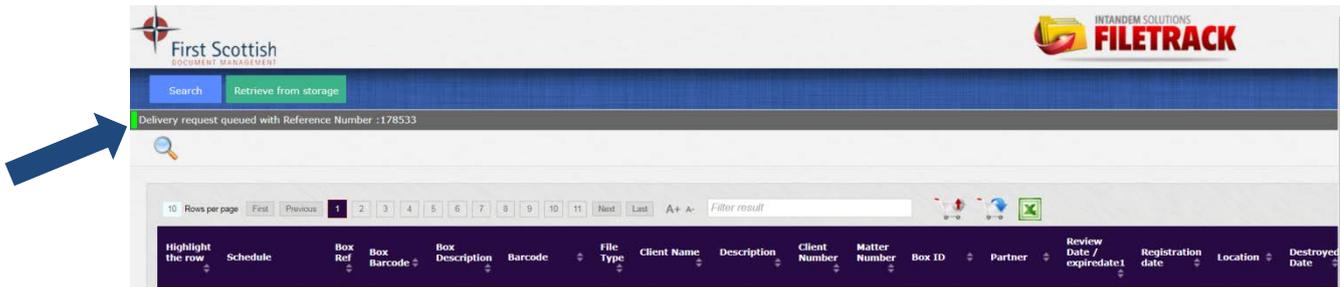
VIEWING A SCANNED FILE.

Please follow the search steps but **do not** add to cart. Instead you will see a highlighted paperclip in yellow next to the cart.

If you click on the paper clip the attachment will appear in the next window,
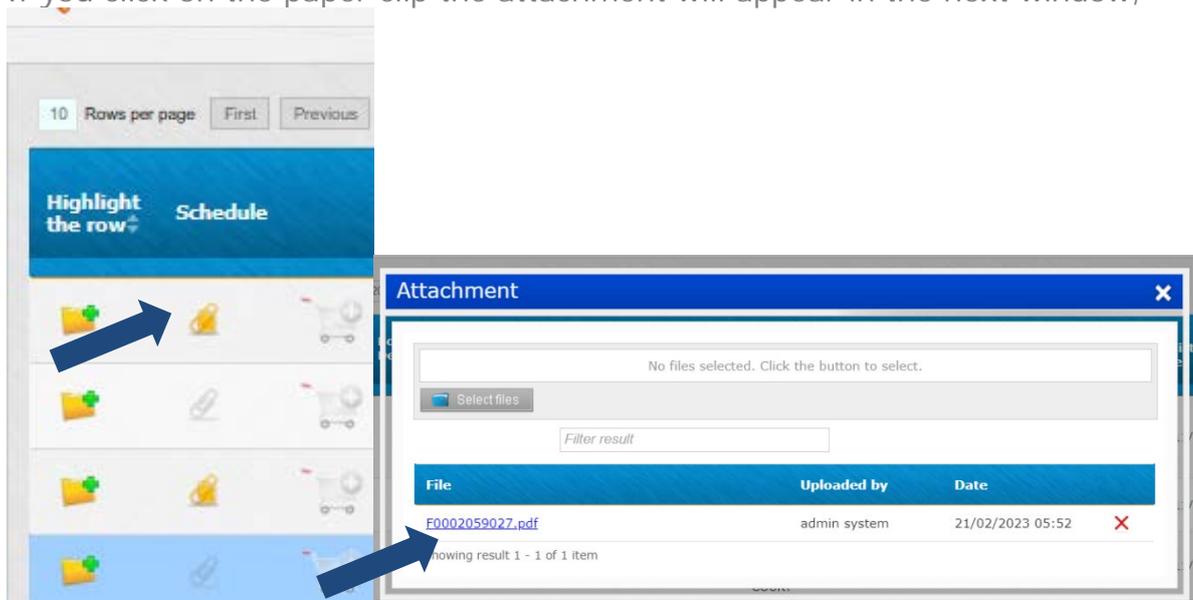
click on the link then your file will automatically download into your downloads folder.

You don't need to do anything else.

If the paper clip is gray this means there is no file to view.

DESTROYED/RETREIVED FILES

If you cannot find the file you need, choose the 'search button' in the Record status menu choose show all items if the file is highlighted in pink then the file has been destroyed, If its highlighted in blue it has been retrieved and will still be with you. You can still view the scanned file via the paperclip if its highlighted in yellow:

FAQ

HOW LONG DO YOU STORE DOCUMENTS POST SCANNING?

Once files have been scanned they will go to a holding area for 3 – 6 months, after this time we will contact you for permission to destroy. Please note we have limited capacity for these so if you need more time please contact us for other storage options.

WILL MY SCANNED FILE BE STORED INDEFINETLY WHEN THE PAPER COPY IS DESTROYED?

Your scanned copy will remain in Filetrack until you instruct us to delete, please note GDPR rules for this.

WHEN I SEARCH FOR A FILE, WHY IS THERE NO FILE SCANNED TO THE PAPERCLIP ICON?

If you have sent in a large number of boxes to be scanned, they are placed in a queue for scanning. We will scan several boxes a month (usually agreed in advance). Should you require a file scanned urgently please e-mail fsdm@firstscottish.com with the details and we can scan it for you ahead of the queue so you can view that day or the next morning. (file size dependant).

HOW DO I ORDER FLAT PACK BOXES OR EMPTY SACKS?

E-mail fsdm@firstscottish to order, boxes come in packs of 10.

I HAVE A DOCUMENT TO BE ADDED TO A SCANNED FILE, CAN I ADD IT LATER?

Yes, you can do this 2 ways. You can e-mail us the documents and we add from there or you can send the documents to **FSDM, DX558301 DALGETY BAY**. Please state the 'F00' number you would like us to add it to.

DOES YOUR SITE USE COOKIES?

Yes. We may obtain information about your use of our site by using a cookie file, which is stored on the hard drive of your computer. This helps us improve our service to you. You can disable the cookies we attach if your browser supports this. However, this may result in you being unable to use some parts of our site. Please visit our Privacy Policy on our website for further details – **www.firstscottish.com**.

HOW LONG CAN I BE IN FILETRACK BEFORE I AM LOCKED OUT?

You do not get locked out but you do have to refresh your screen to see up to date information (F5).

WHAT IF I SUBMIT A RETRIEVAL IN ERROR?

Call or email our FSDM Customer Liaison Team and they will be able to delete your retrieval from the system – **01383 826772** or e-mail fsdm@firstscottish.com.

WHO DO I CONTACT IF I'M HAVING PROBLEMS WITH FILETRACK?

Our Customer Liaison Team have an in-depth knowledge of our system so please call them for advice on **01383 826772**.

I HAVE LOST MY PASSWORD WHAT DO I DO?

Simply click on Forgotten Password which can be found on the front page of Filetrack.